



# Badges of Service

Engaging, Customer-Oriented Student Employee Training

Access Services Conference 2017  
Atlanta, Georgia

Lori Hilterbrand – Circulation Unit Supervisor, Valley Library  
Bryan Feyerherm – Student Employee Supervisor, Valley Library



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# OSU Libraries & Press



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Hogue, Theresa (2017) [Photograph]  
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<http://oregonstate.edu/dept/ncs/lifeatosu/>

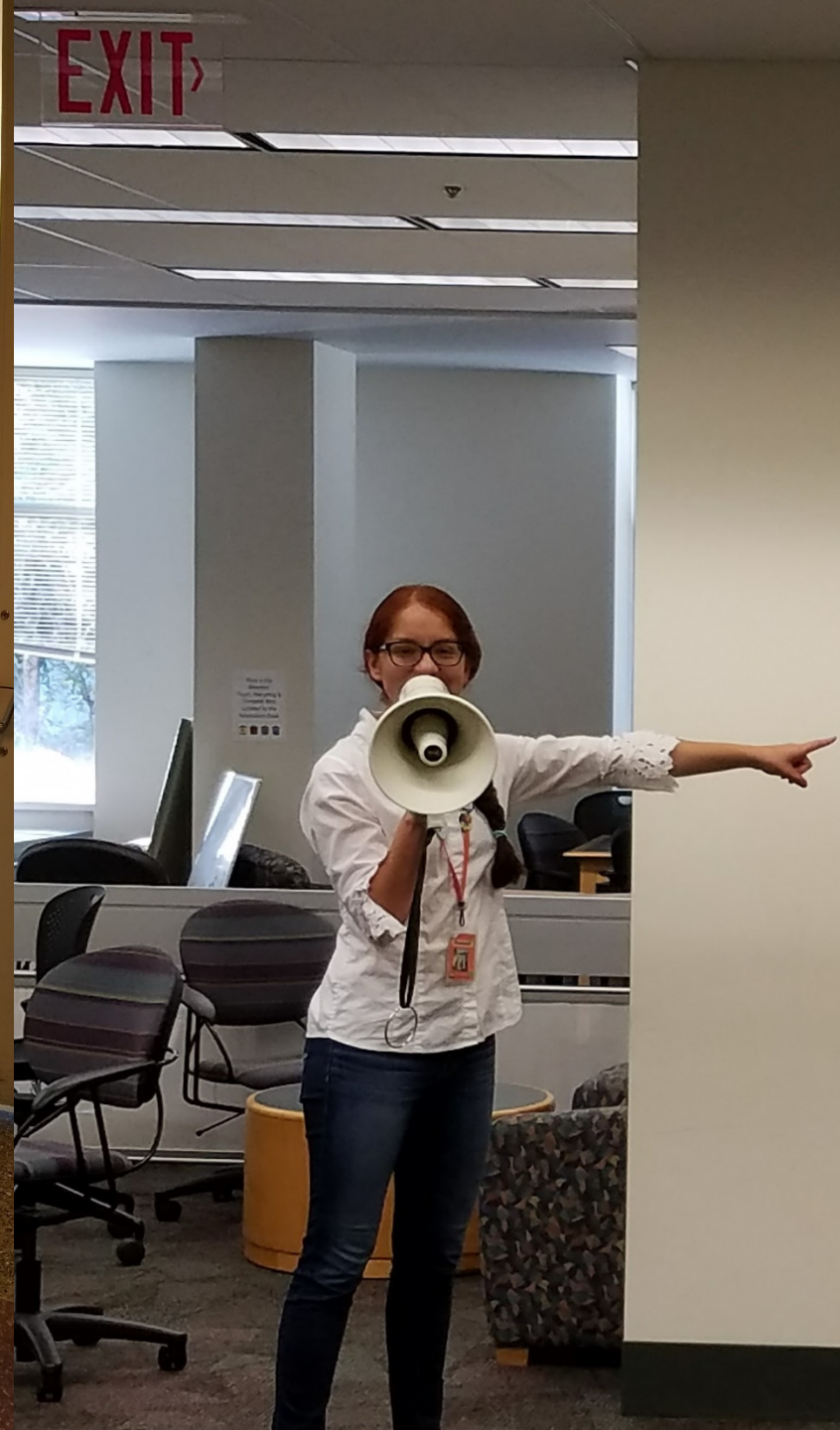
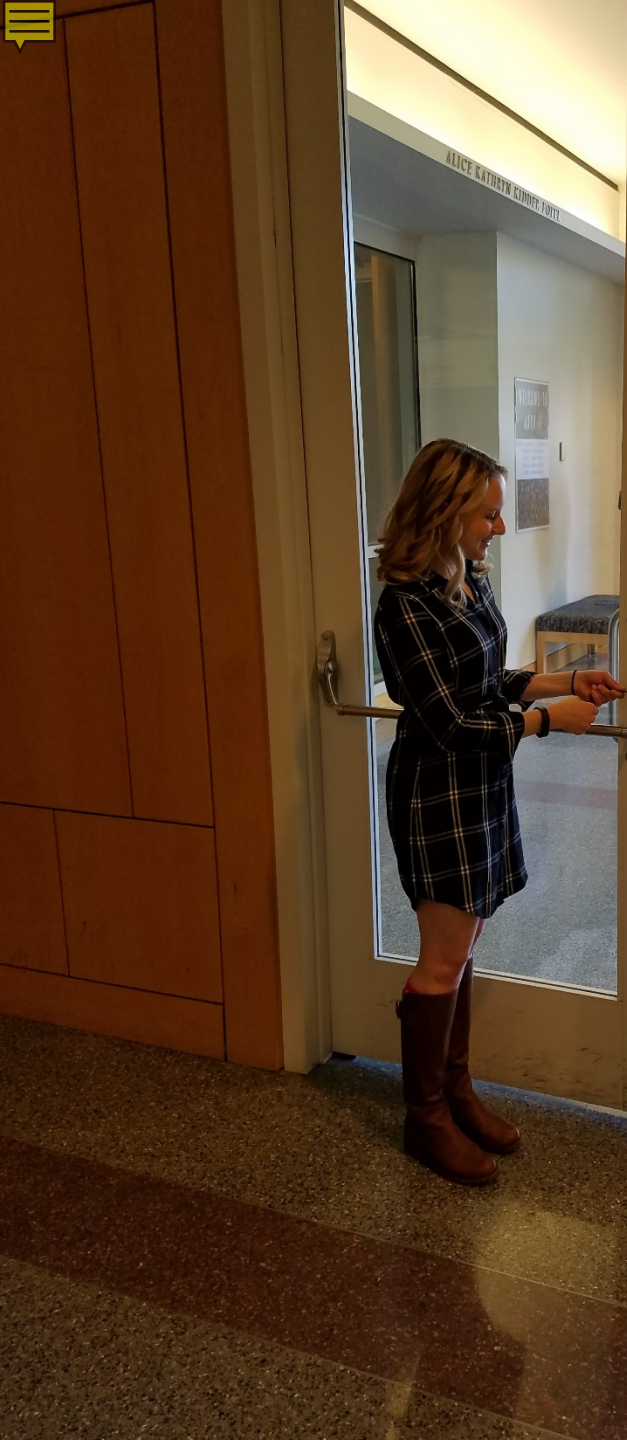


# Our Circulation Unit



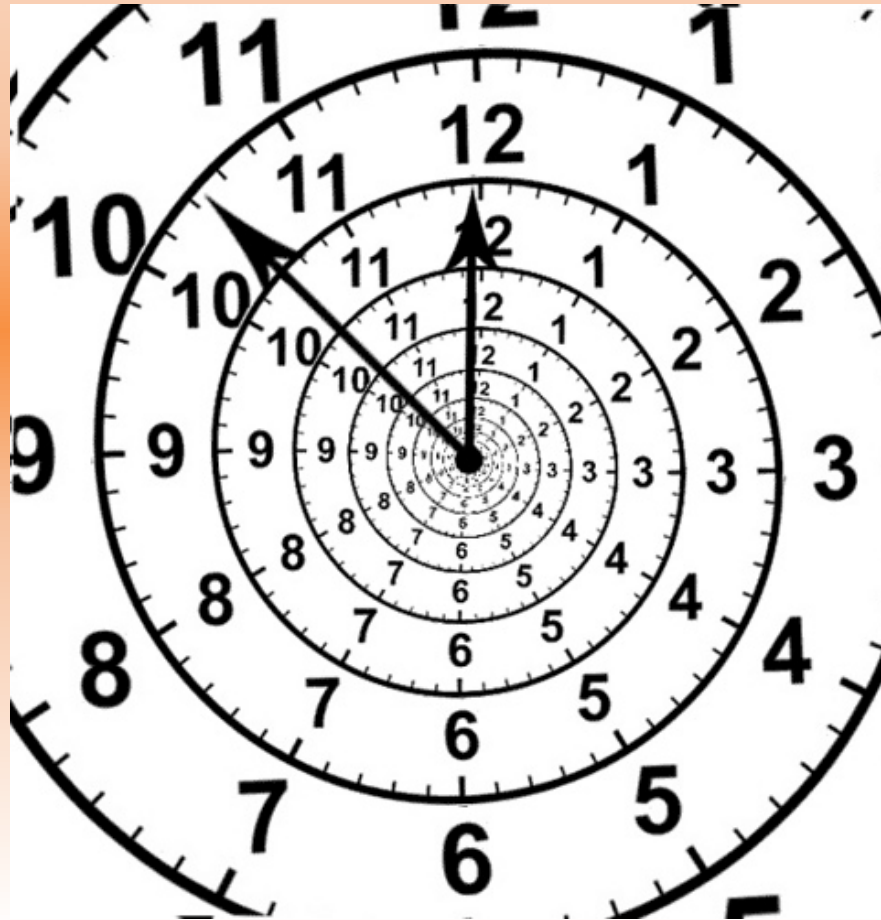
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# Our Training Program



Terminology Changes
Student Permissions in Alma
Alma Menu
* FullFulfillment > Checkout/Checkin > Manage Patron Services
* FullFulfillment > Checkout/Checkin > Return Items
* Fulfillment > Course Reserves > Courses
* Administration > User Management > Find and Manage Users
Patron Record Overview
* Patron vs Staff Patron Records; Internal (OSU) vs. External (n
* Primary Information - Name, ID (link to Identifiers), User Gr
* Notes - Primary (overdue items, items on holdshelf), User N
* Loan Display - Display (This session, All), Renewal, Placing a
* Returns Display - Display (This session, all); checking in, Acti
Checking Out an Item
* Changing a due date
Checking In an Item
* Check in item with hold
* Backdating
* Item with parts (not working?)
Renewing Items
Barcoding an Item (On the Fly)
* Replacing a barcode
Change a due date
Placing a Request (Hold)
* Available and checked out
* Recalls

Van der Steg, Robbert (2011)  
Animated Spiral Clock with 2 pointers. CC BY-NC 2.0  
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# Who Is Involved?

Content

Training

Assessment

Staff

Documentation

Organization



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# Our Philosophy

## Give 'em! the PICKLE!

“Do what it takes to make things right”  
“If you don’t have a reason to say no, say yes!”

### Focus on:

- Patron confidentiality
- Hands-on-training
- Written resources
- Ask questions!
- REFER - Rely on staff for knowledge, judgement, and safety concerns
- Gather student feedback and ideas



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Farrell, B., & Media Partners Corporation. (2002) [Photograph]  
Retrieved from  
[http://www.giveemthepickle.com/pickle\\_principle.htm](http://www.giveemthepickle.com/pickle_principle.htm)



# Before the Training Modules...

## Circulation Training

Updated 12/01/2011 cds

# Grind

personnel or building issues

errors  
or OSU Libraries Computers

- ☐ Collaborative Learning Center (CLC)
- ☐ Food & Drink Policy
- ☐ Learning Commons
- ☐ Library Services for Persons with Disabilities
- ☐ Local
- ☐ Map
- ☐ Policies
- ☐ appropriate
- ☐ Special
- ☐ Study
- ☐ Study

### 3. Library V

- ☐ Library Catalog
  - Library Home > Find It > Library Catalog
- ☐ Borrowing Information
  - Library Home > In The Library > Services: Borrowing
  - Information on ...
    - Loan Periods
    - Items borrowed at Circulation desk
    - Account Information
    - Requesting, renewing, returning and Campus borrowing

- Course reserves, study rooms, laptops, lockers, research rooms, kindles

# Chore

- Library Home > Borrowing > Account Information: Overdue, Lost or Damaged Items > Late Fees – (information text)

at top

ary > Floor Maps

ron types

liates, Associates, Retired,

Alumni , Oregon Residents – 30 days, 3 renewals

- Faculty, Graduates, Special Graduates, Post-bac staff and their affiliates: affiliate faculty /

# Drudgery

# Struggle



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# WIKI



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# DOCUMENT!

WIKI WIKI WIKI WIKI WIKI

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**Confluence** Spaces ▾ People Browse ▾ Create


Search

- 24-5 Procedures
- Alma
- Board Games
- Building
- Check-In
- Checkout
- Claimed Returned
- Confidentiality of Records
- Course Reserves
- Daily Tasks
- Damaged Items and Missing Parts
- Disability Access Services (DAS) Requests
- Employee Resources
- Equipment
- Extended Campus, Summit, & Interlibrary Loan
- Fines, Fees & Appeals
- iPads
- Kindles
- Laptops
- LibAnalytics
- Library Patron Accounts

 **Circulation Department**

**Home**

Added by Bryan Feyerherm, last edited by David Moynihan on Jun 29, 2016 (view change) show comment



**Rotated Chromebook display - How to fix it**

Rebecca Coulterpark posted on Oct 30, 2017


Some of the Chromebooks have been coming back with the screen display upside down or sideways

There is a very easy fix: press ctrl+shift+refresh at the same time. You will need to press the refresh key

correct orientation.

(Pics to be added tomorrow)

Edit



**Food 4 Fines Ends Soon!**

Emma Kridler posted on Oct 08, 2017

Food 4 Fines will end this Tuesday, October 31st! Please remind patrons that they have until midnight

October fines waived.

**REMINDER:** Do not waive the following charges: LOCKER KEYS, UNIVERSITY SHOP, SUMMIT, ILL

Here's the lowdown:

- When: October 15-31st

WIKI WIKI

# Training Modules

## Training Track

**Module 1:  
Circulation  
Orientation**

**Module 2:  
Intro to  
Alma, Open  
Room and**

**Module 3:  
First Shift  
Survival**

**Module 4:  
Safety First**

**Module 5:  
Trainee**

**Module 6:  
Cadet**

**ILLiad  
Module 7:  
Expert**

**Module 8:  
Patron  
Experience**

**Module 9:  
Master**



## Special Modules

**24/5 Night  
Owl**

**Lead  
Students**


**Weekend  
Warrior**



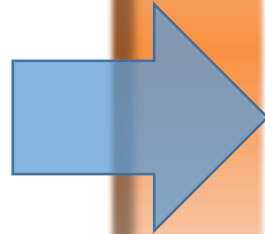
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# Training Modules

 This module continues basic knowledge beyond First Shift skills.


- 1 Personal Check Out
- 2 Desk Workflow
  - 2.1 When the Desk is Super Busy
  - 2.2 When the desk is slow
  - 2.3 Answering the phone
- 3 Check In
- 4 Renewing items
  - 4.1 How to Renew an Item in Alma
- 5 Course Reserves
- 6 Laptops
- 7 Kindles
- 8 Tablets
- 9 Lockers
- 10 Group Study Rooms
- 11 Research Rooms
- 12 Equipment
- 13 Request Shelf
  - 13.1 3D Printing
- 14 Board Games



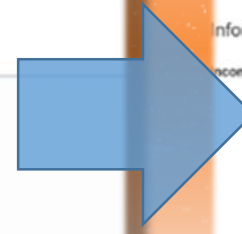
## How to Renew an Item in Alma

 Refer to [Renewing Items in Alma](#)

### Course Reserves

 See [Course Reserves](#) including:

- Policies and check out periods
- Renewals
- Instructors placing materials on reserve
- Instructors removing personal materials from reserve
- Overnight check out
- Booking media for classroom use
- Permanent Reserves



Circulation Department / Home

## Course Reserves

Added by Bryan Feyerehem, last edited by Rana Reeves on Oct 11, 2016 (view change)

Information for the beginning of term...

Incoming reserve requests from instructors

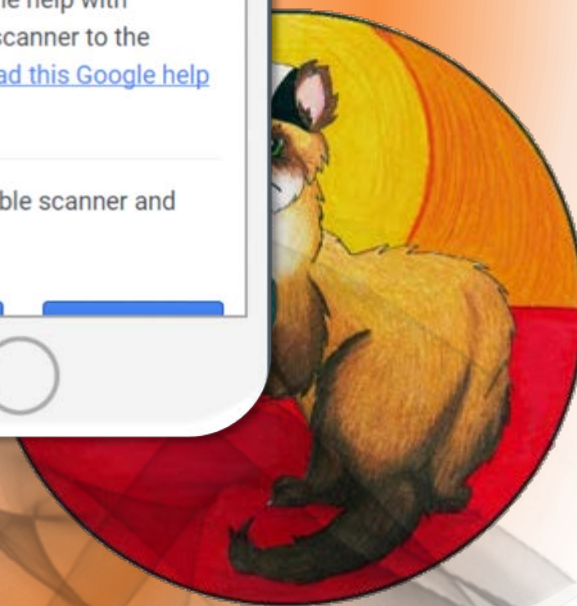
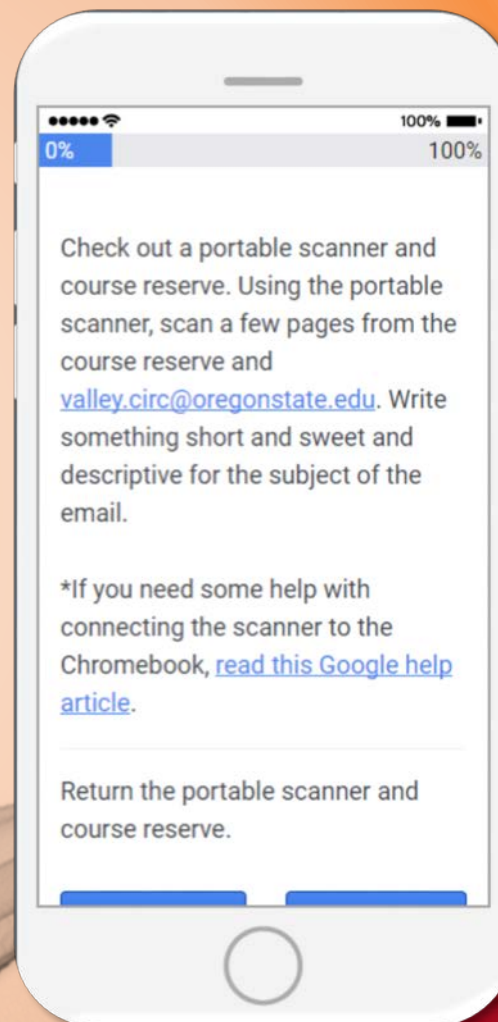
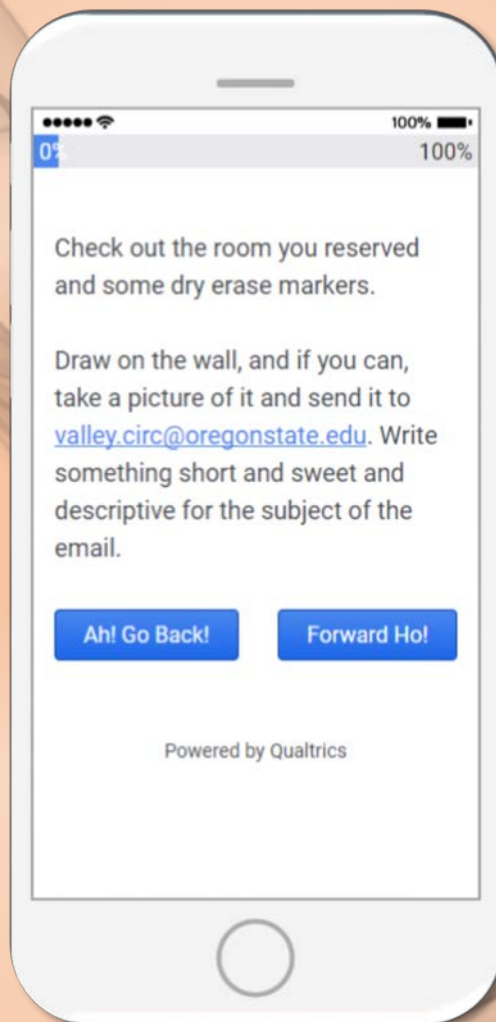
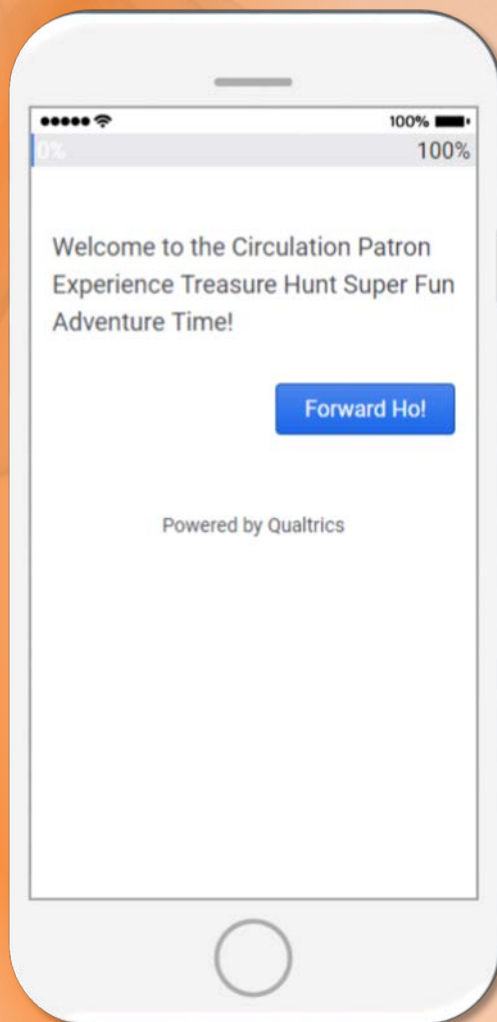
- Ask if the course reserve form has been filled out and if it hasn't, guide them to the computer at the end of the counter to fill it out.
- If the instructor has any special requests or questions please ask them to place them in the comments section of the form.
- Inform the instructor that it may take up to one week to process course reserve items.
- Fill out a course reserves slip, place it in one of the items, and put them on the incoming reserves shelf. Please be sure to put your initials and the date on the bottom of the slip.
- If an instructor wants to book media items for classroom use, have the instructor fill out a course reserve form and select "Media Booking" from Material Type drop-down menu.



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# The “Patron Experience”





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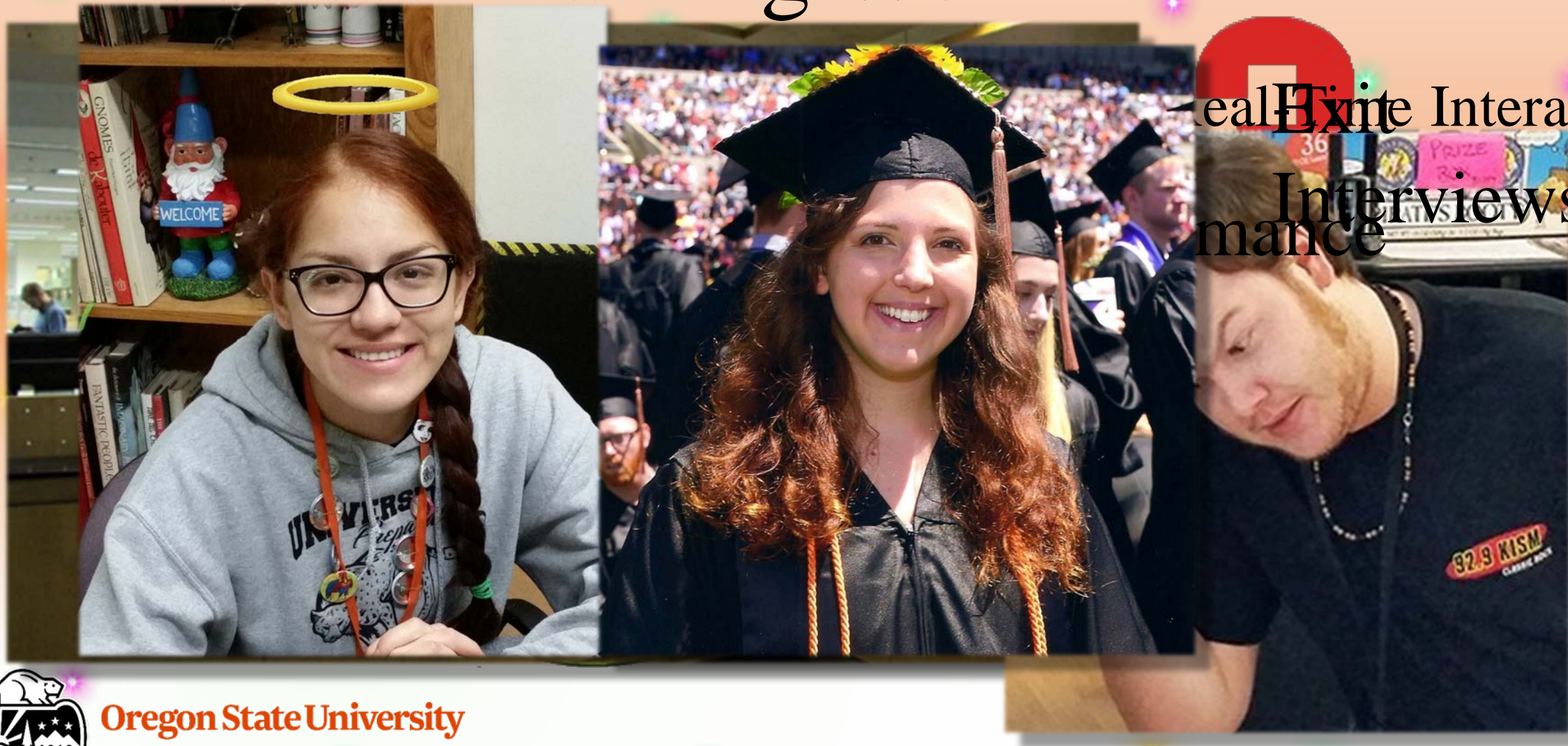
Designed by our in-house artist and 24/5 student supervisor April Zeller



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# Does our Training Work?



Real Time Interaction  
Interviews  
Performance



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# Thank You Circulation Staff!

- Rebecca Coulterpark
- Kelly Holcomb (former employee)
- Emma Kridler
- David Moynihan
- Rima Reves
- Sarah Schuck
- Autumn Sunshine
- Christie Surprise-Tolj
- Katie Warrener (former employee)
- April Zeller





# QUESTIONS?



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